

# Final Report and Findings

**Task Group to Support Expansion of PCC Cataloging in Sinopia**

Jeannette Ho and Mary Seem

# Objectives

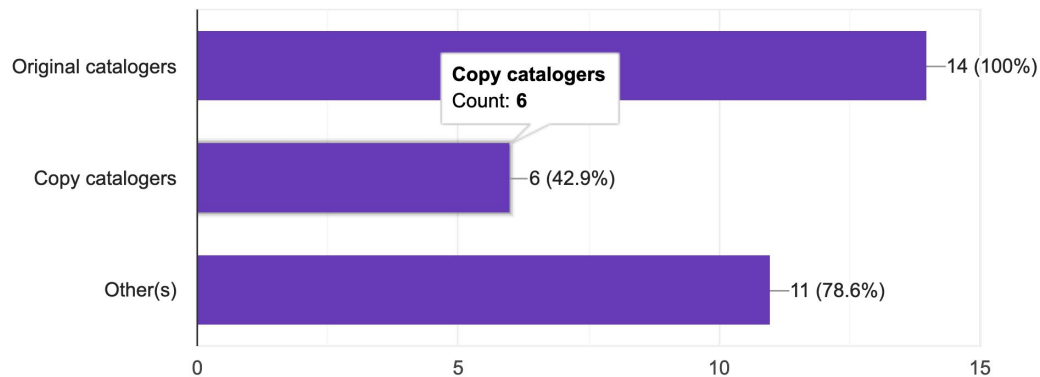
- Charged with two tasks
  - To survey cohort and LD4 partner libraries
  - To propose recommendations to the PCC
- Survey, feedback, as well as collaboration with task group helped to inform the final recommendations
- Also collaborated with the PCC Standing Committee on Training
  - Review of future training modules
    - Input relating to the survey results

# Survey

- 70% response rate
- An average of 11.57 individuals trained at each library

What level of staff were trained to use Sinopia at your library? (Check all that apply)

14 responses

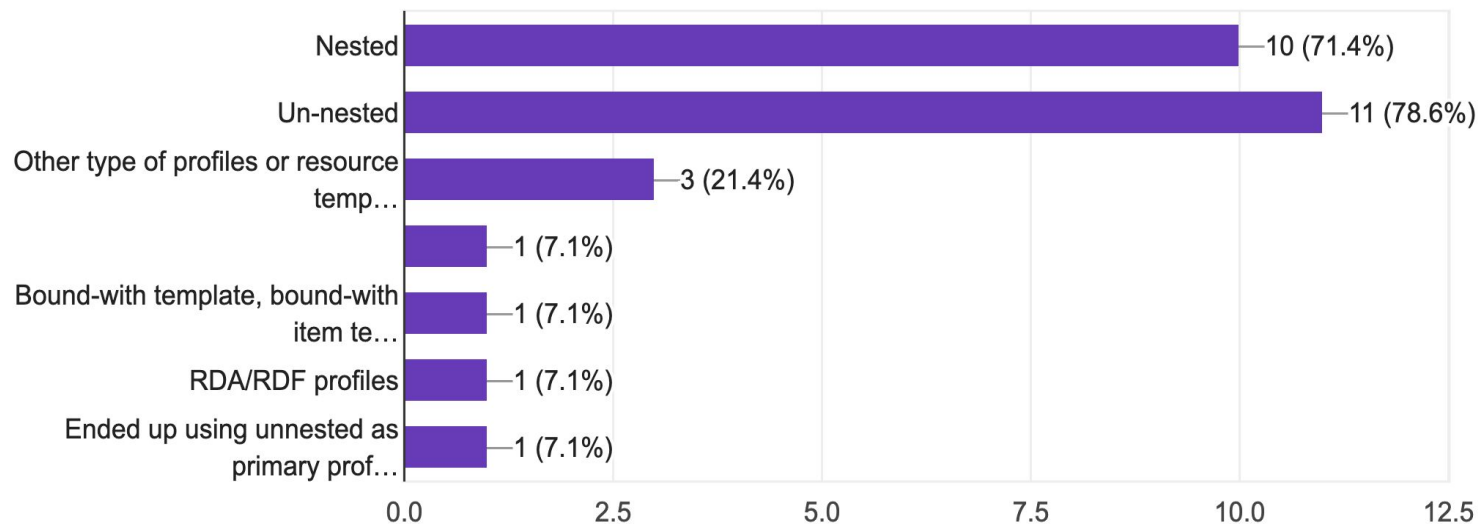


■ Metadata librarians, metadata technician, student workers, non-catalogers

# Profile Creation and Use

Which types of profiles did you use at your library? (Check all that apply)

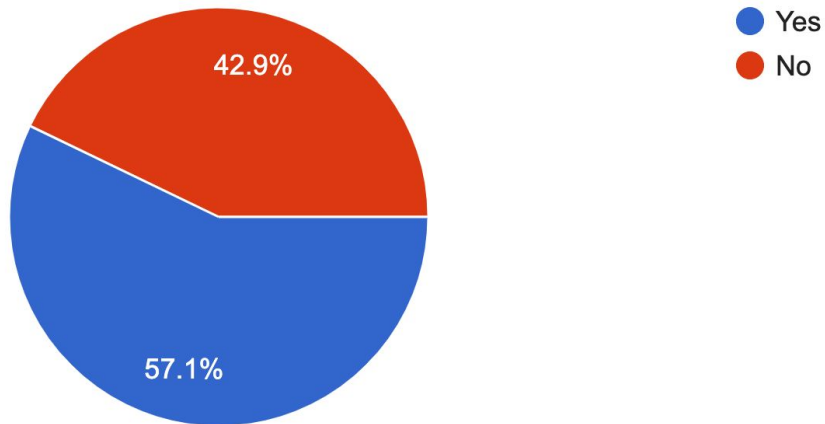
14 responses



# Profile Creation and Use

Did you use any existing templates created by others without modifying them?

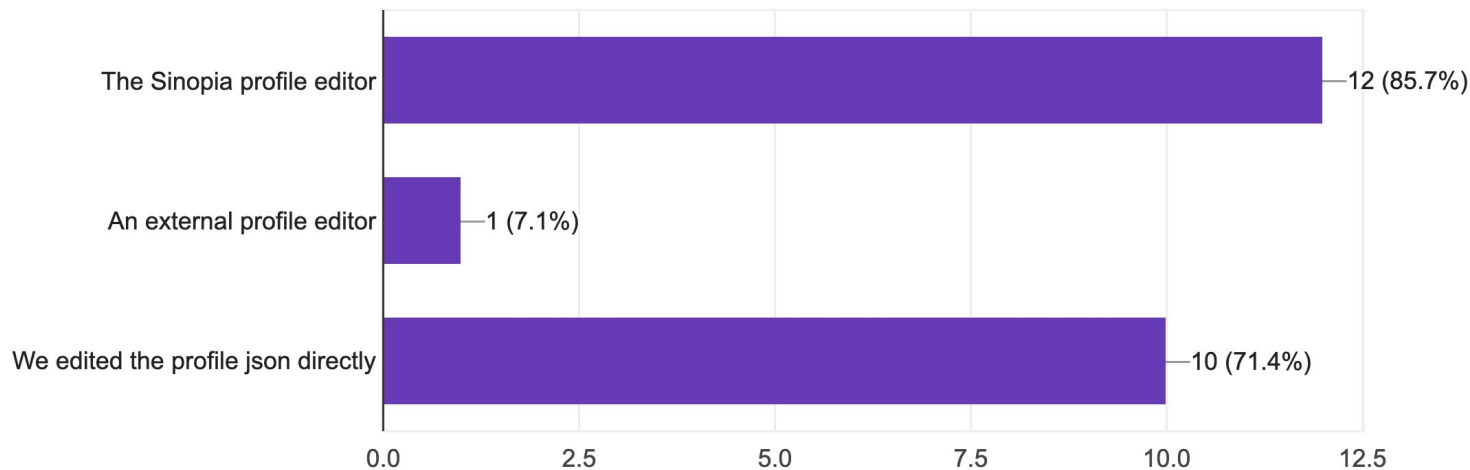
14 responses



# Profile Creation and Use

If you created or modified templates for use in Sinopia, what tool(s) did you use? (Check all that apply)

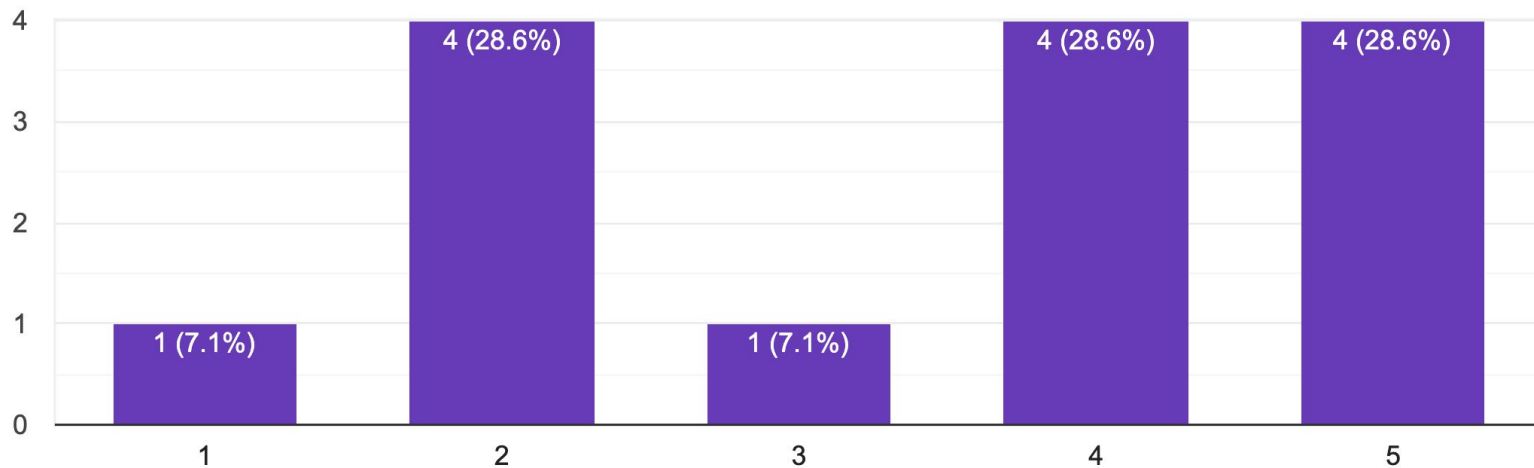
14 responses



# Profile Creation and Use

Please rate how easy it was to create or adapt profiles for Sinopia:

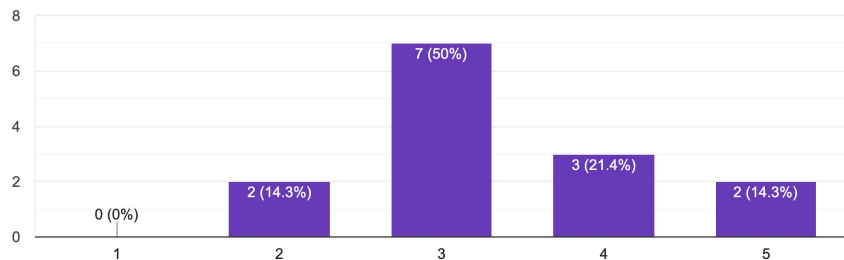
14 responses



# Using Sinopia

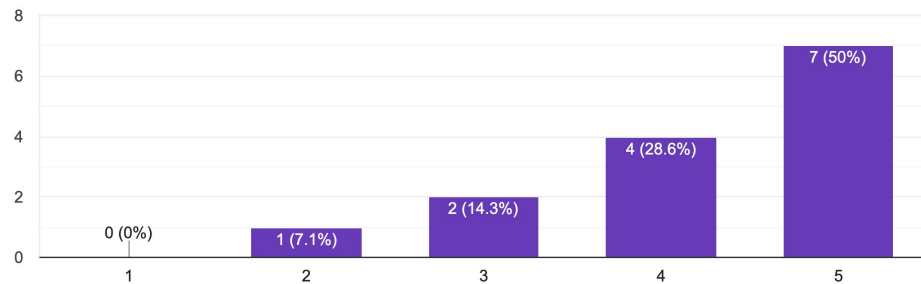
How would you rate the ease of training people to catalog in Sinopia?

14 responses



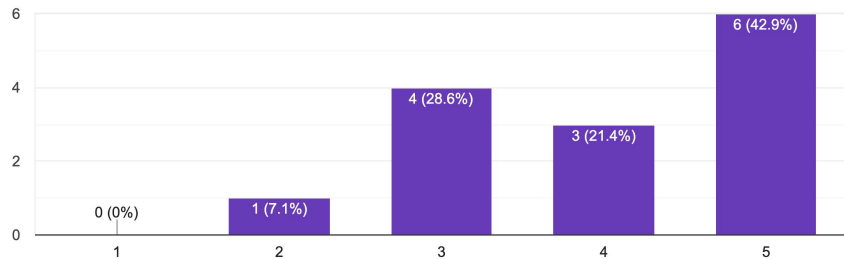
How would you rate the ease of reviewing the work of others in Sinopia?

14 responses



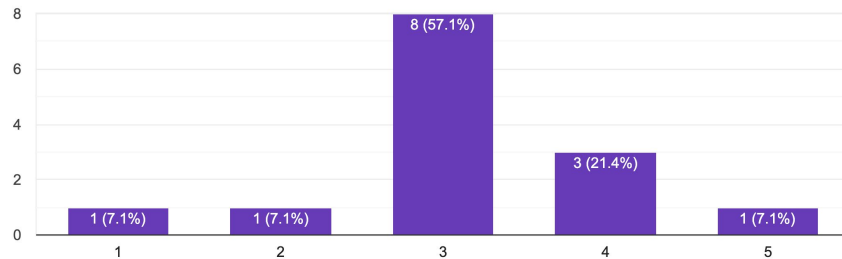
How would you rate the ease of cataloging in Sinopia vs. other interfaces?

14 responses



How satisfied were you with your library's experience working with Sinopia?

14 responses

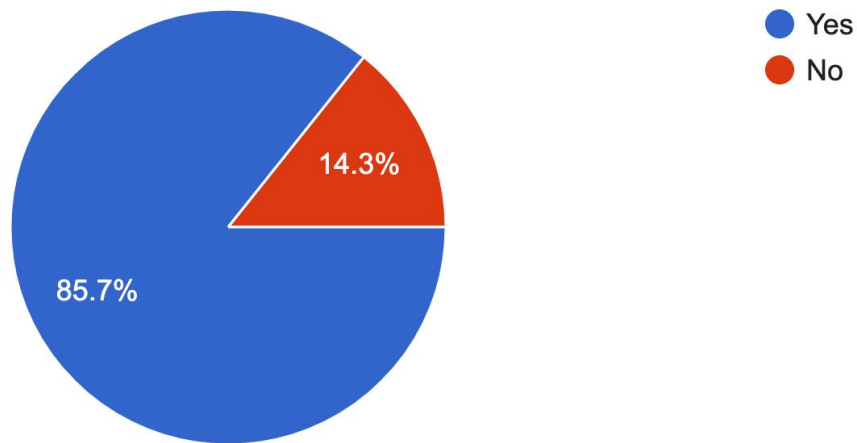




# Using Sinopia

Did you develop a workaround to perform functions or tasks that could NOT be performed within Sinopia?

14 responses



# Lessons Learned

- Lots of customized profiles make shared cataloging more difficult
  - try to stick with the base templates for data that will be shared
- Don't create a new resource template unless you have a significant case study for doing so
- Familiarizing users with Sinopia is key
- It's important to develop more feedback mechanisms and step-by-step instructions to guide catalogers in using Sinopia.
- Understanding the concepts of a Work, Instance, and Item, as they are expressed in BIBFRAME, is really important when figuring out what data elements belong where
- Emphasis for basic catalogers should be on choosing appropriate resource template and learning each of its elements

# Best Practices

- Standards for field use in Work, Instance, Item, Admin Metadata, etc
- How to format dates
- How to format series
- Copy cataloging standards
- Interpretation of cataloging rules in a linked data environment.
- Nested vs. Un-nested profiles
- Clarifying the relationship between Work, Instance, Item, and Admin Metadata
- The mechanics of linkages when using un-nested templates. How is this manifested when the data is exported?
- Training and best practices on the BIBFRAME model, training on the overall ecosystem/data flow.
- Also, as more and more users are joining, it would be fundamental to have some common Sinopia “rules of engagement” or community guidelines for editing and linking

# Sinopia Futures

- Responses included:
  - Continued use of affinity groups
    - Unanimously supported by LD4P2 cohort members
  - Community-wide cataloging best practices
  - Sinopia UX
  - PCC profile standardization and maintenance

# Recommendations for Supporting the Expansion of Sinopia for PCC Cataloging

“Formulate a plan to expand PCC cataloging in the Sinopia cataloging tool. This plan should include recommendations for supporting PCC members (institutions or individuals) who wish to use Sinopia both for experimentation and exploring cataloging in a linked data environment.”

The entire charge is at:

<https://www.loc.gov/aba/pcc/taskgroup/Expanding-Sinopia-Cohort-charge.pdf>

# Things we were asked to consider:

- A mentorship program where LD4P2 Cohort members provide guidance to those new to Sinopia and linked data
- Ideas for creating learning opportunities and communication channels for PCC members using Sinopia
- Needs of additional training that needs development, including training in additional formats such as video or self-paced exercises in consultation with work with the PCC Standing Committee on Training's existing Sinopia Training Task Group)
- Ways to gather and prioritize input of PCC Sinopia catalogers and communicate it to Sinopia developers for the LD4P3 timeline (2020-2022)
- The possibility of creating an LD4 PCC affinity group

# Three options for a mentorship program:

- **Informal pairing of LD4P2 participants with PCC members**

--libraries or individuals available to provide guidance can list their contact information on publicly available wiki page

- **Individuals volunteer to mentor others with an interest in that topic**

- **Formal pairing based on individual's skills/expertise and needs of PCC members**

--Needs can be assessed with a survey for new members.

--ALCTS mentorship program can serve as a model (see documentation at <https://alcts.libguides.com/mentoring>)

# Learning opportunities and communication channels:

- **A PCC Sinopia Catalogers Wiki**

- a place to find training materials, Affinity Group meeting notes, future training, FAQs, a list of PCC-approved profiles and other relevant content

- PCC-run but can include links to resources on the LD4P2 wiki (including LD4 affinity groups)

- Publicly available to all (including non-PCC members)

- see wikis created for the LD4P2 initiative, PCC ISNI Pilot, and the current PCC Wikidata Pilot for ideas on how to structure one



# Learning opportunities and communication channels:

- **Continued use of pre-existing listservs:**

- PCC-list** as primary communication channel (at beginning of PCC expansion for Sinopia). Will send initial announcements related to the expansion here, including invitations to PCC members to participate

- LD4 “sinopia-users”** (Google list that recently replaced the PCC-TG1 list)

- LD4 Sinopia User Group Slack channel**

## PCC Sinopia Catalogers Affinity Group (proposed charge):

- Provide a welcoming, collaborative, and supportive space to discuss topics related to Sinopia, with a focus on cataloging issues.
- Gain a basic understanding of how to catalog in Sinopia in the context of the PCC community and its norms.
- Discuss and document training needs of new users of Sinopia. Survey members of this group at the beginning and later, at periodic intervals to gauge such needs, as well as monitor topics posted on the LD4 Sinopia User Google Group and Slack channel. Maintain communication with the Sinopia Training Task Group and PoCo about these training needs.
- Introduce new users of Sinopia to communication channels and resources to help them learn how to use Sinopia. Facilitate connections with the LD4 community that may lead to mentoring and networking opportunities.

## PCC Sinopia Catalogers Affinity Group (proposed charge continued):

- Invite and encourage experts from the LD4 community to participate in the group to provide training on specialized topics (e.g., cataloging of serials or special formats in Sinopia, etc.).
- Gather feedback from new Sinopia users on Sinopia and facilitate the sharing of such feedback to the LD4P3 partners.
- Gather feedback from new Sinopia users on PCC-approved profiles and best practices as they are developed and share such feedback with the groups that will be responsible for managing and maintaining them.

# Gathering and sharing input from PCC members with LD4P3 developers

- Gather input at meetings of Affinity Group for new Sinopia users
  - Invite leaders and developers of the LD4 Sinopia User Group to share feedback. Alternatively, have leaders of Affinity Group attend LD4 meeting and present feedback to be prioritized.
- Feedback form on the Wiki for PCC Sinopia users
- Include new PCC Sinopia users in usability interviews with Astrid Usong
- Make new PCC Sinopia users aware of feedback process that exists using GitHub. (cannot prioritize feedback unless they self-identify as being part of the PCC expansion and why request would benefit entire community)

# Identifying training needs for future development

- List of topics that LD4P2 cohorts mentioned in our survey (see the appendix in our final report)
- Topics suggested by chairs of the PCC Sinopia Training TG and Linked Data Advisory Committee
- Need best practices before training materials can be developed
- Recommend surveying new Sinopia users to see what topics they would like to have training on in addition to the modules created by the PCC Sinopia Training Task Group
- Affinity Group for PCC members may also be used to identify gaps in need of more training or best practices development. Can inform PCC committees.

# Members of the task group:

Ian Bigelow (Univer

Theo Gerontakos (University of Washington)

Jeannette Ho (Texas A&M University), co-chair

Audrey Pearson (Yale University)

Isabel Quintana (Harvard University), PCC Policy Committee liaison)

Jacquie Samples (Duke University

Mary Seem (Frick Art Reference Library), co-chair

Christie Thomas (University of Chicago)

# Questions?

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Jeannette Ho ([jaho@library.tamu.edu](mailto:jaho@library.tamu.edu))